Are you ready for the Digital Personalisation Revolution?

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Summary

- Understand the key first steps in developing a digital personalisation strategy
- Know more about your customers and their needs
- Convert more customers by delivering relevant content to them
- Throw away your product benefit sheets and design your messages around your customer, not your company

Introduction

According to recent Gartner research, 80% of CMOs are not ready for the next big step in digital experience management. Digital personalisation is here. With the technology getting cheaper more and more organisations are taking note. By personalising your customers' digital journey you can achieve better conversion rates and more leads and sales. But it's not easy. You need not only the right technology but also the right strategy behind it. This article explores the key strategic steps you need to deliver relevant, personalised user journeys.

Throw away your product benefit sheets. No-one cares apart from you!

The first steps in developing a digital personalisation strategy

1. Develop user personas

User personas are more important now than ever, having a deep understanding of what your users, customers or buyers core challenges are will allow you to build marketing messaging that helps to solve them. Technology allows you to personalise users' experience and opens new possibilities for marketers. Accurate B2B user personas help you tailor content to users, increasing leads and conversion and ensuring that your Content Management System achieves a good RoI.

Your User persona is so much more than just a list of job titles, you have to get under the skin of your user, and discover what is aspirational, from what is achievable. You need to look at every aspect of your target personas professional life, by having this understanding you can increase conversion rates by delivering relevant content to them. If your content does not fulfil a need then the user is less likely to engage with you.

Priority Initiatives	Success Factors	Barriers	Decision Criteria	Decision Journey
• What are the core priorities for your user? • How does your product or service make the users life easier or fill a specific need?	• What means success for this user? • How does your product or service ensure their success?	• What are the main barriers to purchase? • How do you overcome these barriers?	• What criteria does the user use when deciding if you are the right supplier?	• What is the decision journey? • Who are the main stakeholders that effect this journey? Is there a procurement process you have to take into account?

Figure 1

Figure 1 details the core elements that you should be looking at when developing your user personas. Some personas are more complex than others, it really depends how complex your proposition is.

By developing these personas you can then start to build your marketing messaging around the customer, what their initiatives are, what is success for them etc.

It is normally good practice to develop these in line with the account handlers and customers respectively, this will help to certify better conversion rates when you come to build your messaging.

2. Plot the User Journey

All users are on journey, no matter how they found you, or where they proceed to. By mapping the user journey you can pre-empt drop offs and maximise opportunities for conversion.
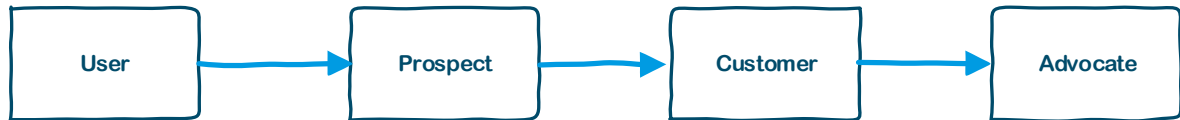

Figure 2

Figure 1 shows a typical end-to-end user journey using the inbound marketing methodology, in its simplest form. However, some steps are missing. You need to map as many interactions as possible.
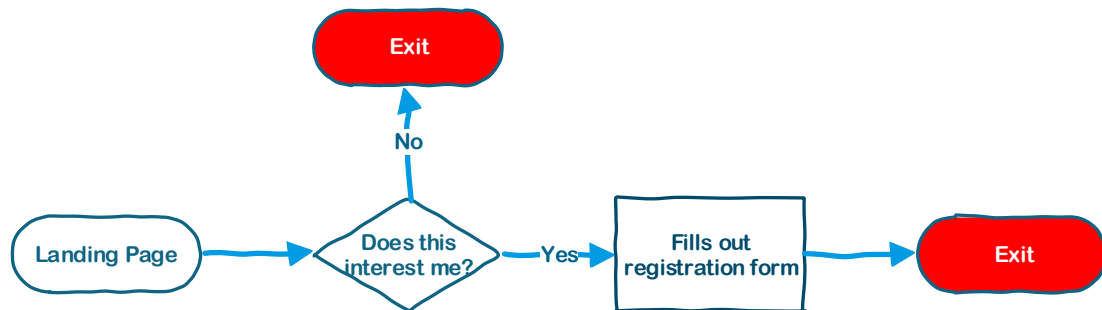

Figure 3

Figure 2 shows a simple user journey where you aim to get a user to sign up for your newsletter. It is a flat, transactional journey. There are plenty of exit options. Most users will drop out before they get to the form. If your user experience is poor further drop offs will occur at the registration phase.

Move beyond transactional interactions, engage with the user at every stage.
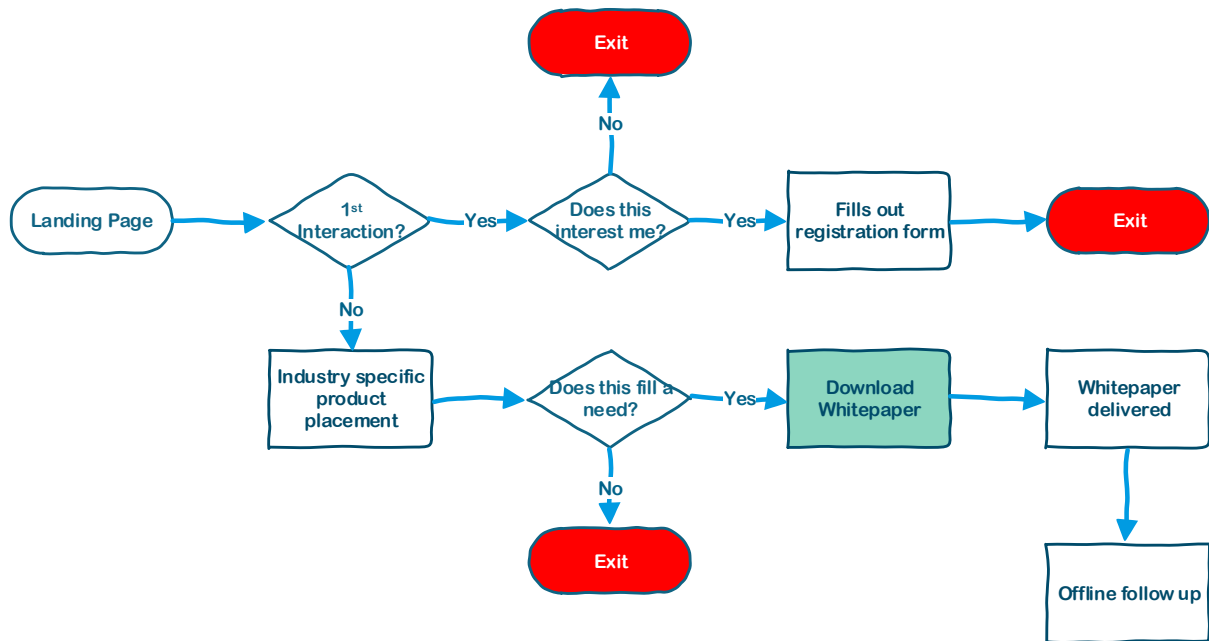
Figure 4

Figure 3 shows a different picture. The goal is to get a user to download a whitepaper. Because you have information gathered from users when they registered you can offer industry/job specific content. This is more likely to engage the user. You can start to nurture them as a lead.

In reality interactions are more complex. This is just an example of how the user flows through your site. By mapping their interactions and matching them with analytics data you can deploy strategies to minimise drop-offs.

If you run an e-commerce site, these interactions become more complex, with highly targeted product placement based on customer/user profile behaviour metrics.

3. Integrate your online and offline interactions

You may have noticed in figure 3 there was an offline follow up action. This is nothing new. Leads from the web are often treated in this way.

Figure 5

Figure 4 shows a sample B2B customer journey; there are many stages where a customer or prospect interacts with you online. Before you even know who they are, prospects will be checking your company out. There many steps in this customer journey where the right use of digital marketing and lead nurturing can be enhanced through online experiences e.g. the stages of awareness, relevance or consideration.

Integrating your online data with CRM will help sales people get ahead of the conversation

One of the greatest features of personalisation technology is ability to track what a customer views online and pass it back to your CRM system. Most providers offer common CRM connectors (MS Dynamics, Oracle etc.). The benefit for you is that your sales people will know what products people have looked at and be able to tailor their conversation with clients.

4. Measure, measure and measure again!

What's the use of all this data without correct measurement? Find out what works for you and what doesn't. You should have a dashboard that details how each persona is performing. For underperforming segments, carry out root cause analysis to investigate why some areas don't perform as well. Well-designed BI tools can make your programmes incredibly powerful and help you improve conversion rates. However, this approach will need constant fine-tuning in order to get the most out of your investment.

5. Find the right technology for your needs

Many providers offer marketing automation CMS based systems. Here are some that provide what most companies need*:

- Kentico
- Sitecore
- Hubspot
- Episerver

These are mid-market providers.

This is not a recommendation.

Conclusion

Before you develop your digital personalisation strategy, you need to get to know your customers and build the right personas for them. This is best done together with your Account Handlers and the client. The best personas result from asked clients about their challenges and aspirations.

For each user interaction with your website you must have a clear goal and build your strategy on it. By having a clear goal and knowing who the customer is you can deliver content that is relevant to them. This can improve conversion rates by 40% or more.

Integrate your online and offline customer/prospect journeys, by passing data from your website back to your CRM system to allow your sales teams to tailor the conversation to the customer. This will accelerate conversion.

Leaders in the CMS field are making what was the preserve of companies like Amazon affordable for the SME market. Users are also becoming more fickle in what content they want to consume.

About the Author

Ben Tresham is a Director of Customer Attuned and heads up their Digital Services division. He is an expert when it comes to how organisations go about managing customer experiences digitally. Ben has worked on and led projects for some of the world's largest companies. His client list include, Sanofi Aventis, Imagination Technologies, Microsoft, Virgin Atlantic, The Cabinet Office, HMRC and DfE.

He is passionate about building great client relationships, not only for himself but for his clients as well. He has a deep level of understanding in how to manage customers, citizens and stakeholders effectively.

About Customer Attuned

Customer Attuned is a leading B2B Customer Management consultancy that help its customers build better B2B Relationships. They do this by deploying innovative tools that help their clients understand where the gaps are in the customer management capabilities, then come up with a realistic plan to fill those gaps. They operate across many sectors but have specific expertise in Technology, Automotive, Insurance, Financial Services, FMCG and Manufacturing.

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